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AUTHOR Lovelace, Bill E.; And Others
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ABSTRACT

This manual was developed to help expedite the efforts of postsecondary vocational education and Job Training Partnership Act (JTPA) programs in developing comprehensive strategies, by joint planning, to serve the common targeted populations of the Carl D. Perkins Vocational Education Act of 1984 and JTPA. It is a supplement to "Navigating the Labyrinth: The Connection between the Carl D. Perkins Vocational Education Act and the Job Training Partnership Act." The manual is organized in six sections. The first section asserts the necessity for joint planning to serve the targeted population without duplication of effort and provides a glossary of terms. The second section discusses the barriers to coordination, linkage, and joint planning, and the third section reviews the planning process. The fourth and fifth sections explain the advantages of joint planning and plot strategies to achieve such planning. The final section describes coordination and linkage activities. Appendixes profile model programs in Texas and four programs in other states. (KC)

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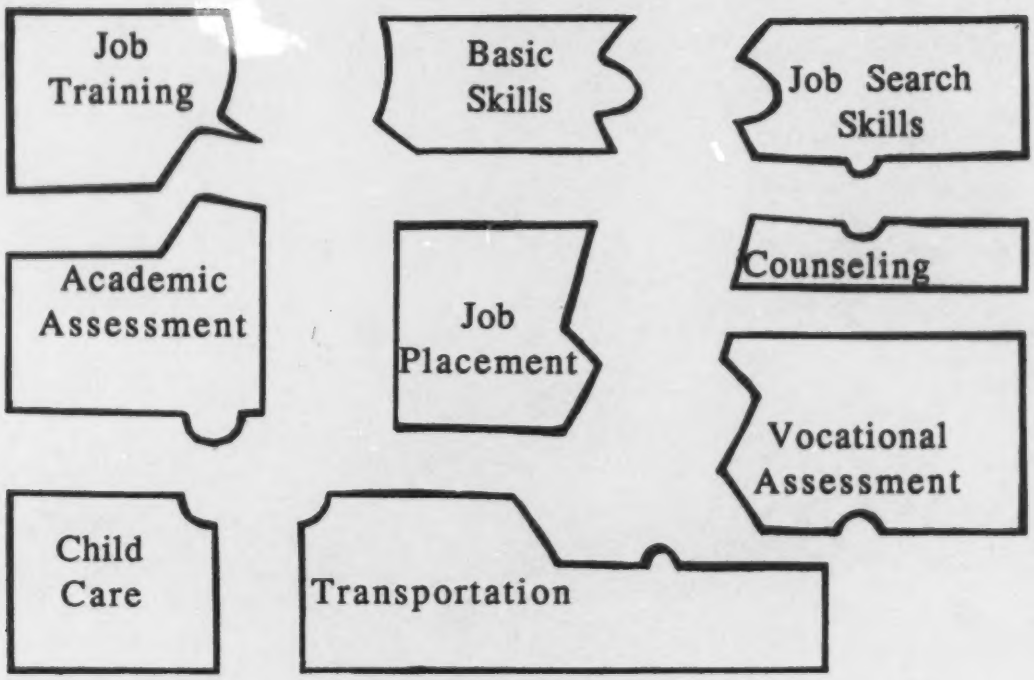

JOINT PLANNING: THE HOW-TO MANUAL

FOR POSTSECONDARY INSTITUTIONS

BEST COPY AVAILABLE

CARL D. PERKINS VOCATIONAL EDUCATION ACT -- JOB TRAINING PARTNERSHIP ACT (JTPA) JOINT PLANNING: THE HOW-TO MANUAL

FOR POSTSECONDARY INSTITUTIONS

A Supplement to Navigating the Labyrinth

Prepared by the
University of North Texas
School of Human Resource Management

Bill E. Lovelace
Joyce Nies
Sharon Smith

JUNE 1988

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Coordinating Board Grants Manager:	Dr. Natica Petrossian Director of Federal Projects Texas Higher Education Coordinating Board Austin, Texas
Contractor:	University of North Texas (North Texas State University) School of Human Resource Management Vocational Research and Development Denton, Texas
Project Staff:	Project Administrator, Dr. Joyce Nies Principal Investigator, Dr. Bill E. Lovelace Research Associate, Dr. Sharon R. Smith Research Assistant, Ms. Renee Murphy
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In addition, the project staff expresses its appreciation to the presenters and participants of the six Carl D. Perkins/JTPA Joint Planning Workshops conducted during the months of January and February, 1988. The presenters were from community colleges and service delivery areas. It was from the interaction with the presenters and participants of the workshops that the needed content of the "How-To Manual" was determined.

Finally, appreciation is extended to the other project staff members, Dr. Sharon Smith and Ms. Renee Murphy, for their patience and dedication to making revisions and the final preparation of this manual.

Bill E. Lovelace
Project Principal Investigator

PREFACE

Since the passage of the Manpower Development and Training Act of 1962 and the Vocational Education Act of 1963, there has been an emphasis on and mandates for coordination and linkage of vocational education programs and training conducted under the provisions of legislation which are currently administered by the U.S. Department of Labor and the U.S. Department of Education. The Texas Higher Education Coordinating Board and the Texas Department of Commerce have taken steps to create an environment that is conducive to local providers of postsecondary vocational education and training to achieve coordination through joint planning efforts.

It has long been argued as to whether coordination and linkage should take a "top down" or "bottom up" (grass roots) approach. It is my strong and personal belief that both must take place simultaneously, with the state providing the leadership and environment so that coordination can occur at the local level. With statewide interagency coordination effected through discussion, nonfinancial agreements, and contracts, local agencies and institutions are helped in facilitating programs, activities, and services for those students and potential students who have been perennially underserved -- our mutual targeted, or special, populations. We can all serve more of those who need serving, and achieve their highest potential through pooling our resources to provide the maximum in training, services, education, and placement. Our efforts need to be truly coordinated to go beyond placement -- retention, upgrading, promotion -- to provide effective results for the most we can achieve in our state today.

It is hoped and anticipated that this manual will expedite the efforts of postsecondary vocational education and JTPA entities to develop comprehensive strategies, by joint planning, to better serve the common targeted populations served by Carl D. Perkins and JTPA.

Natica "Tish" Petrossian
Director of Federal Projects
Community Colleges and Technical Institutes Division
Texas Higher Education Coordinating Board

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I.

INTRODUCTION

A major current concern of the nation, and particularly Texas, is economic development. The primary indicators of economic growth are income, employment, and production. Because of its major role in economic development in Texas, occupational education and training is in a most critical position of accountability. Economic development and the changes of the labor market require an efficient delivery system of occupational education and training. The delivery system for occupational preparation must meet the needs of the individual in terms of salable job skills and the needs of the changing labor market. Business and industry develop and relocate in areas where there is a potential labor force to meet their respective needs for workers. Texas has this potential labor force which in part is composed of the unemployed and the undereducated. This component of the potential labor force is often referred to as the disadvantaged or "at-risk" youth and "hard-to-serve" adults.

A study conducted in 1981-82 by the Research Triangle Institute, Research Triangle Park, North Carolina identified in Texas, sixteen state agencies and five state commissions as having state statutory responsibility or authority for providing occupational education and training programs and services. Two of the state agencies which have responsibility and authority to provide occupational education and training for the disadvantaged and other special populations are the Texas Higher Education Coordinating Board and the Texas Department of Commerce. Other agencies which have similar responsibilities to the disadvantaged include the Texas Department of Human Services, the Texas Rehabilitation Commission, and the Texas Education Agency.

The Texas Department of Commerce through the Work Force Development Division is responsible for serving the disadvantaged under provisions of the Job Training Partnership Act (JTPA). The Community Colleges and Technical Institutes Division of the Texas Higher Education Coordinating Board has the responsibility for occupational education and training and the administration of the Carl D. Perkins Vocational Education Act for Texas postsecondary institutions.

In this era of the reduction of funds for education and training and the continued increase in the number of the disadvantaged, providers of occupational education and training are experiencing a decrease in resources relative to the number of persons to be served. Congressional action and state legislation, where not mandated, have encouraged coordination and linkage between state agencies and local providers in

the use of Carl D. Perkins and JTPA funds for meeting the needs of the disadvantaged. National and state surveys and studies conducted to determine the extent of coordination and linkage between Carl D. Perkins and JTPA entities have revealed that the desired coordination and linkage have not been achieved. In a few cases where there were indications of the achievement of the desired coordination and linkage level, it was found the desired level of achievement was the result of joint planning. Chapter VI of this manual presents examples of linkage and coordination activities that were identified in national and state studies.

The first product of a joint planning activity between Carl D. Perkins and JTPA state agencies that has had a lasting impact for the coordination and linkage in Texas is the document NAVIGATING THE LABYRINTH. Navigating the Labyrinth: The Connection Between the Carl D. Perkins Vocational Education Act and the Job Training Partnership Act, Roberts and Petrossian, was prepared to encourage and expedite joint planning and coordination between Texas postsecondary institutions and JTPA private industry councils.

This manual was developed as a supplement to Navigating the Labyrinth. In addition to other essential knowledge needs by planners of programs to meet the occupational education and training needs of the disadvantaged, Navigating the Labyrinth, Chapter V, Planning, has described the planning requirements of both Acts for the state and local levels.

It is anticipated that this manual will be read by a diverse population. Therefore, the following terms are defined as used in this manual for the benefit of the reader.

Local education agency (LEA): a board of education or other legally constituted local school authority having administrative control and direction of public elementary or secondary schools in a city, county, township, school district, or political subdivision in a state: Independent School District (ISD).

Community based organization (CBO): a nonprofit organization which is representative of a community or significant segments of a community and which is experienced in or capable of providing job training and related services to the economically disadvantaged.

Private industry council (PIC): a group of individuals having responsibility and authority to provide policy guidance for and exercise oversight with respect to activities under the JTPA job training plan for its service delivery area in partnership with the unit or units of general local government within its service delivery area. The council is

composed of representatives of (1) the private sector and (2) educational agencies. Members of the council are appointed by a chief elected official of a sole unit of local government or by the chief elected officials of all units of local government when the service delivery area includes multiple units of local government.

Postsecondary institution (PSI): an educational institution legally authorized to provide postsecondary education within the state. In Texas the majority of institutions conducting postsecondary vocational education programs are community colleges, junior colleges, and the Texas State Technical Institute system.

Service delivery area (SDA): the geographic area in which JTPA services are provided by a private industry council.

II.

BARRIERS TO COORDINATION, LINKAGE, AND JOINT PLANNING

In the efforts to develop strategies for achieving the desired level of coordination and linkage of the various agencies, organizations, and local providers in meeting the occupational education and training needs of the disadvantaged, it was determined that the barriers to these efforts should be identified. A review of the literature has revealed a variety of factors or barriers that have hindered efforts to coordinate and link since the days of the Vocational Education Act of 1963 and the Manpower Development and Training Act. Barriers to coordination and linkage between Carl D. Perkins and JTPA and other programs for the disadvantaged which have been identified include the following:

- Turf issues protecting bureaucracy
- Turf issues protecting institutions
- Feelings of mutual distrust
- Concerns for program control
- Differing perspectives
- Lack of knowledge about the other system, agency, legislation
- Planning cycles
- Lack of leadership for coordination (state and local)
- Lack of comprehensive (cooperative) planning at the agency or local institutional level

- Program quality concerns
- Concerns for research
- Communication problems
- Bad prior experiences
- Client or student eligibility
- Funding restrictions

Some of the barriers listed above, such as funding restrictions, may be readily detected; others, such as differing perspectives and knowledge of legislation, may not be as easily detected. The barriers are many and sometimes difficult to overcome. However, strategies can be developed to remove or cope with the identified barriers and facilitate improved and effective coordination and linkage.

FACTORS THAT FACILITATE COORDINATION AND LINKAGE

Studies have revealed that the following strategies or factors have facilitated coordination and linkage between Carl D. Perkins and JTPA:

- Leadership at the state or regional level
- Improved communications and trust
- Willingness of people to cooperate
- Shared representation on committees and task forces
- Knowledge of the other program; law, rules, regulations, purposes, allowable activities
- Sharing of instructional resources
- Sharing of program planning and relevant information
- Joint planning
- Joint programs

Implementing or using all of the above factors may appear as a non-achievable objective. Successful efforts to implement or utilize the factors are being made. Private industry councils (PICs) are using education advisory subcommittees (EAS) to assist them in developing the local job training plan. The EAS of each PIC must include representation from local public schools and postsecondary institutions (PSIs). Each public education person who desires to achieve coordination and linkage with JTPA should attempt to serve as a member of the PIC or EAS. If this is not feasible, the individual should attend the open meetings of the PIC or EAS. Other positive activities have been the development of regional planning models and joint planning workshops. Implementing or using

all of the factors for coordination and linkage can be achieved through the process of planning.

III.

THE PLANNING PROCESS
A REVIEW

Chapter V of Navigating the Labyrinth described the planning requirements of Carl D. Perkins and JTPA. It is the purpose of this chapter to review the process of planning and show how the planning process can be used to achieve the desired coordination and linkage between Carl D. Perkins and JTPA entities and other entities serving the disadvantaged.

A great number of designs and systems have been developed, advocated, and used as a process for planning. The term process has been defined and interpreted as a specific method, involving sequential steps of operations, for completing an assigned task. The process of planning as used in this manual is depicted graphically in Figure 1. The reason for this graphic depiction is that it shows sequential steps but is not restricted to a single method for carrying out the process. The process as presented permits the use of a variety of planning methods such as comprehensive planning, strategic planning, tactical planning, and joint planning.

Planners of occupational education and training programs have traditionally approached the process of planning and development in a logical and organized manner; that is systematically. Being systematic, however, is not the same thing as applying a systemic approach that includes needs analysis, strategic planning, tactical planning, and planning for management control. As used here, needs analysis means the process of identifying and determining priorities of needs. Strategic planning involves the acquisition of resources-- existing, new or from other sources, or combined sources--to meet the identified need(s). Strategic planning is essential when established criteria for the allocation of financial resources have been mandated by governmental bodies. The mandated criteria automatically establish the mission, goals, and objectives of financially assisted programs, services, and activities at the state, regional, and local levels. Tactical planning relates to the allocation

THE PROCESS OF PLANNING

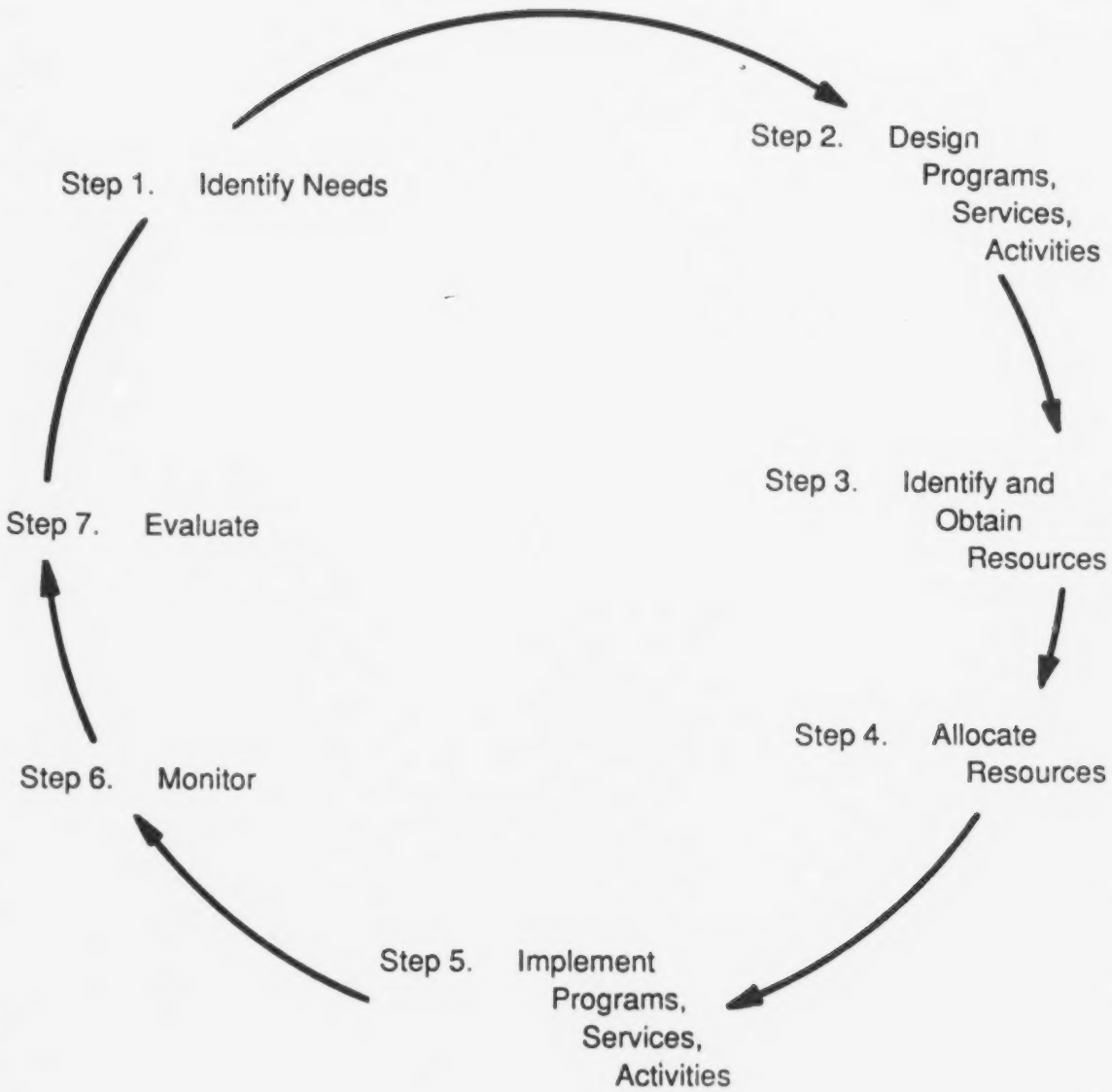

Step 1. Identify Needs
Step 2. Design Programs, Services, Activities
Step 3. Identify and Obtain Resources
Step 4. Allocate Resources
Step 5. Implement Programs, Services, Activities
Step 6. Monitor
Step 7. Evaluate

Figure 1

of resources among programs, services, and/or activities designed to meet the identified needs.

In order to maximize the benefits of strategic and tactical planning, both of which involve the procurement and use of resources, it is essential that the holders and users of those resources make a comprehensive planning effort for the maximum effective and efficient use of all available resources to meet the needs of targeted populations.

Comprehensive planning is essential when three or more governmental bodies are providers of similar programs, services, and activities for the same targeted population. Comprehensive planning involves planning at the local, regional, or state levels, by representatives of all entities.

The concept of comprehensive planning for meeting the education and training needs of special populations must have a sound base, be clearly defined, and be meaningful to the planners and decision makers. L. W. Wright in his paper "Developing Comprehensive Planning in State Education Agencies" (B. S. Furse, ed. Salt Lake City: Utah State Board of Education, 1969) defines comprehensive planning as:

> ... a process of designing programs and allocating resources to achieve specific objectives, then modifying and improving those activities through continuous evaluation of how well the objectives are reached. It requires utilization of all available and applicable technologies, widespread involvement of those concerned with the results of planning--those who design and operate the system, those who pay the bills, those who are affected by the system, those who - in other agencies - have overlapping and/or related responsibilities and those who control or tap needed resources--and mechanisms for facilitating and coordinating the highest quality planning.

This definition shows that comprehensive planning requires the involvement of different entities at different levels. It requires a realistic involvement of all entities with available resources and delivery capabilities for meeting the vocational education and training needs of defined populations. Comprehensive joint planning would occur when two or more institutions, agencies, or organizations plan together at the same geographic or regional area.

The emphasis of this manual is to describe procedures and give examples of joint planning by the planners of PICs and PSIs or other state agencies having a responsibility for the disadvantaged in a specific

region. Joint planning efforts by the respective state agencies and PSIs are essential in meeting the occupational education and training needs of disadvantaged youth and hard-to- serve adults, especially those who are unemployed.

Planning is an administrative function essential to making decisions -- decisions that will be required in developing, implementing, and evaluating programs, services, and activities to meet the identified needs of a defined population. Planning must be continuous. However, emphasis for planning purposes should be placed on the period preceding the due date for which applications for financial resources are to be submitted.

Any PSI which attempts to meet the occupational education and training needs of special populations, including the disadvantaged, must use the process of comprehensive planning within and across each of its own departments or divisions. Comprehensive planning at the PSI should occur prior to being involved in joint planning with an external entity serving the same population(s).

The basic steps of planning for comprehensive planning within the institution and for joint planning with external agencies or organizations are the same.

STEPS OF THE PLANNING PROCESS

STEP 1. IDENTIFY NEEDS

a. IDENTIFY POPULATIONS TO BE SERVED

Each PSI identifies the number of disadvantaged who desire and/or could benefit from occupational education and training and related services.

Each local PSI identifies the number of individuals who are disadvantaged by disadvantaged condition: economically, educationally, handicapped, single parent, and limited English proficient (LEP).

The number of disadvantaged by disadvantaged classification and age is shared with the respective PIC of the service delivery area (SDA) in which the PSI is located.

Worksheet #1 provides an example of how the number of the disadvantaged to be served may be tabulated.

b. IDENTIFY NEEDS OF POPULATION

After the targeted population has been identified by classification, the next step is to identify the needs of the targeted population by each subcategory of the population. The overall purpose of this is to identify the occupational education and job training needs of the disadvantaged. A subcategory of the population would be the economically disadvantaged. The needs of the economically disadvantaged could include:

- assessment of each person's interests, abilities, occupational aptitudes, and educational achievement
- basic skills training
- employability skills development
- occupational exploration
- information about occupations and occupational requirements
- opportunities for obtaining occupational training
- opportunities for jobs in identified occupations
- health care
- child care
- transportation aid
- other services

Worksheet #2 provides an example of how the services needed by the disadvantaged may be tabulated.

c. IDENTIFY PRIORITY OCCUPATIONS

The State Board for Vocational Education will identify priority occupations of the state and disseminate the list of priority occupations to local education agencies (LEAs) and PSIs within the state.

d. IDENTIFY NEEDS OF THE LABOR MARKET

Each year the labor market training needs of the SDAs are developed through joint efforts of the Texas

WORKSHEET #1
PSI

Division or Department: (check only one)

____ Adult and Continuing Education
____ Programs for Special Populations
____ Other: (specify other) _____
____ Occupational/Technical Education
____ Student Services

Number of clients identified by this Department or Division by disadvantaged condition.

Disadvantaged Condition*	Number of Clients		Source of Information: Walk-Ins	Source of Information: Recruited or Surveyed	Source of Information: Referral by Admissions or Student Assistance
	M	F			
Economic • Handicapped • Unemployed • AFDC					
Academic					
Limited English Proficient					
Migrant					
Immigrant (legal)					
Single Parent/ Homemaker					
Total M and F					
TOTAL					

* Do not duplicate count. If a participant or currently enrolled student is both economically disadvantaged and academically disadvantaged, count as economically disadvantaged only. If an individual is both a single parent and economically disadvantaged, count as economically disadvantaged only.

Note: This document is not to be used for reporting purposes but for planning purposes only. For reporting, all disadvantaged conditions are recognized and students are identified in each category for which they are eligible.

WORKSHEET #2

Support Services Needed by Disadvantaged Classification

Number Needing Support Service

Support Service	Academic		Economic		Handicapped		Single Parent Homemaker		AFDC Recipient		Limited English Proficient	
	M	F	M	F	M	F	M	F	M	F	M	F
Financial Assistance												
Academic Assessment												
Vocational Assessment												
Basic Skills												
English as a Second Language												
Books, Tuition												
Career Counseling												
Personal Counseling												
Transportation												
Child Care												
Health Care												
Housing												
Job Skills Search												
Job Placement												
Follow-Up												
Other (list)												

Employment Commission, Texas Department of Commerce, and the State Occupational Information Coordinating Committee. PSIs may update the labor market information for their respective service areas by conducting local occupational surveys. The training needs of the labor market of the SDA must be shared with every provider of occupational education and job training programs within the SDA if joint planning is to be achieved.

STEP 2. DESIGN PROGRAMS, SERVICES, AND ACTIVITIES

e. DESIGN POTENTIAL PROGRAMS, SERVICES, AND ACTIVITIES

During this step of the planning process, both the PSI and PIC should design programs, services, and activities to meet the occupational education and training needs of each classification of the disadvantaged population to be served. As each program, service, and activity is developed, the PSI and PIC must identify existing and potential resources needed to conduct the proposed program, services, and activity.

f. MEET TOGETHER AND DEVELOP JOINT PLAN

The tentative designs or plans should be discussed by the PSI and the PIC serving the labor market area. This brings about joint planning which identifies new or additional resources and will identify gaps in and barriers to the plan.

Worksheet #3 provides an example of how the programs may be planned. Data from Worksheets #1 and #2 and labor market training needs from Step 1 are needed for Step 2.

g. DISSEMINATE SUMMARY OF PLAN

A summary of the tentative plan for meeting the needs of the disadvantaged should be submitted to the

WORKSHEET #3

MODEL PROGRAM DEVELOPMENT WORKSHEET

Target Population:

OBJECTIVE:

COMPONENTS/ACTIVITIES:	RESOURCES BY ACTIVITY
Intake/Recruitment	
Individual Vocational Assessment	
Counseling/Guidance	
Student Services/Support Services	
Remediation/Basic Skills/ESL	
Vocational Training/Instruction/Lab	
Employability Skills	
Job Development/Placement Activities	
Follow-Up	
Other (Identify)	

SUMMARY/OVERVIEW OF MODEL PROGRAM:

respective PIC of each PSI. This provides the PIC with information that can be used in developing its local Job Training Plan.

STEP 3. OBTAIN RESOURCES

h. IDENTIFY RESOURCES

The new and additional resources identified in the plan should include financial assistance. The basic sources of financial assistance to the PSI include:

The Texas Higher Education Coordinating Board, Division of Community Colleges and Technical Institutes, Federal Projects Section (Carl D. Perkins) by submitting an Annual Application for allocated funds. Also some money is available for model programs.

The administrative entity of an SDA by contract in response to a request for proposal or through a sole source contract.

The Department of Human Services [Aid to Families with Dependent Children (AFDC)] by cooperative agreements.

The Texas Education Agency (TEA) and/or Adult Basic Education (ABE) Cooperative by application.

STEP 4. ALLOCATE RESOURCES

i. DECIDE HOW TO BEST ALLOCATE AVAILABLE RESOURCES

Upon approval of the applications or response to requests for proposals, it may be determined that all requests were not approved. This will require the deletion of some proposed programs, services, and activities. Or by technical planning with a respective PSI or PIC, a sharing or reallocation of resources will be appropriate for reinstating the deleted programs, services, or activities.

During the allocation of resources, it is essential that planning for management control be implemented. A plan for management control must be developed and implemented to assure that the allocated resources are used in accordance with the specific purpose for which they were allocated. If funds are allocated for 50 percent of a counselor's time to provide job counseling for the economically disadvantaged, then schedules should be developed to assure that the counselor spends 50 percent of his/her time providing job counseling to economically disadvantaged students. A procedure for documenting the 50 percent time (a time and effort record) must be developed and maintained.

STEP 5. IMPLEMENT THE PROGRAMS, SERVICES, AND/OR ACTIVITIES

j. IMPLEMENT THE PLAN

Implementation is achieved by putting the plan into action. If joint planning has occurred between the PSI and PIC then the implementation will be done cooperatively by the PSI linking the performance of the PSI to the requirements of Carl D. Perkins, JTPA, and other cooperating agencies.

STEP 6. MONITOR

k. MONITOR FOR COMPLIANCE

Monitor to ensure compliance with Acts, rules, and regulations promulgated from the Acts.

STEP 7. EVALUATE

l. EVALUATE THE OUTCOMES

Evaluation of the programs, services, and activities are performed to determine if the needs of the disadvantaged have been met as planned. The results of the evaluation are used in reporting to the

respective funding agency and for information essential in determining performance measures achieved. The evaluation results are also used in planning for the following years.

IV.

ADVANTAGES OF JOINT PLANNING

Joint Planning Advantages for Postsecondary Institutions

1. Early identification of eligible populations. Entities within an SDA must identify and qualify potential participants. After the individual has been determined eligible for JTPA (not necessarily enrolled) that person will be eligible under Carl Perkins.

2. Enhances/augments reports of special populations. Because more individuals are identified as eligible, reports of actual figures of special populations will increase, thus expanding the qualification criteria for obtaining additional federal funds the following year.

3. The more eligible populations (especially handicapped and disadvantaged) you serve and have identified, the more future federal money will be available. Formula allocated monies are based in part on numbers served. Increase the number and it will result in qualifying for additional money.

4. Special needs are identified up front. As special or target individuals are determined JTPA-eligible, their concomitant needs are also identified prior to referral.

5. Referral of special populations. Pre-identified and qualified individuals are referred to a PSI and may be entered into the system.

6. Will be able to serve more when expenses are shared. If both programs share the cost of serving special populations, a greater number can be served for a longer period of time.

7. With two systems working together, greater retention of these students will result. Because of additional services offered to disadvantaged and other targeted populations, retention will be more likely.

8. Greater array of services will be available. By offering additional services through Carl Perkins funds, a greater expansion or extension of services will be made available.

9. Greater tracking capability of student goal. Because PICs must determine the individual goal of eligible recipients, PSIs will have access to that goal and track that student accordingly.

10. Better serve local labor market needs. With both entities working together, the most up-to-date labor market informationcan be shared and utilized.

11. Can do co-surveys and needs assessments which will help alleviate load. Presently local education agencies, PSIs, entities within a SDA, and others are performing needs assessments. By working together and combining all needs on one format, the needs assessment information and activities need not be duplicated by each entity, saving time and effort, as well as presenting a unified front for the private sector.

12. Placement activities and follow-up activities enhanced. With more than one entity working on placement and follow-up activities, there is a greater opportunity for the achievement of positive placement in employment and the creation of successful tracking systems.

13. Prioritization of services will be easier and retention of students will be greater. Because more than one entity will be assessing needs and prioritizing services, a more effective prioritization of services can be planned. Also, this means that a greater array of services will encourage student retention.

14. Increases chances of more JTPA contracts. If institutions can build in transition, placement, and follow-up services, they can receive more contracts from JTPA entities which are required to do performance based contracting.

15. Increases credibility with private sector cost and effectiveness. Working together can create a "united front" presented to the private sector.

16. Maximizes uses of campus facilities and staff. Shared costs of training and services can provide savings for all entities involved.

17. JTPA funds can cover base costs of instruction for handicapped, disadvantaged, and LEP. Carl Perkins can only pay for 50% of excess costs which may be supplemental staff, supplemental equipment or supplemental materials, or supplemental support services.

Joint Planning Advantages for the JTPA System

1. Lower "cost per" performance standards. Use Carl Perkins funds to offset costs; increased service level means costs will be lower.

2. Increase service to harder-to-serve in long term training (e.g., AFDC recipients, individuals with minimal work history or lower literacy levels). Increase "adult welfare entered employment rate". Use JTPA, state and local vocational education funds to pay training cost and Carl Perkins to pay supportive services costs, thus enabling the SDA to provide longer-term, substantive training for these special populations.

3. Increase "wages at placement". By combining resources to offer longer training, these special populations are more

likely to get hired, and at higher hourly wages, because of their skill levels.

4. Greater likelihood of exceeding (adult) performance standard and thus eligible for full 6% incentive funds.

5. By serving harder-to-serve, expectations for performance standards will be lower because adjustment model compensates for these special populations.

6. Focus more JTPA funds on training and therefore meet or exceed the 70% requirement. Use Carl Perkins to cover more of the supportive services costs; these are sorely needed dollars since JTPA has a 30% limitation on administration and supportive service.

7. Improve relations with private sector. Greater effectiveness in performance will improve credibility. This may also increase likelihood for securing private sector funds to augment federal resources.

8. Use of PSIs enables JTPA system to benefit from facilities, equipment, and curricula available on campuses. This reduces purchases of training equipment on JTPA contracts and focuses more funds on directly training the JTPA participants.

9. Reduce workers being laid off because of obsolete or inadequate skills. Under Title III, linkage with Carl Perkins Title IIA (Adults in Need of Training or Retraining) enables employees to be upgraded while working to prevent their being laid off, thus lowering the number of dislocated workers.

V.

STRATEGIES TO ACHIEVE JOINT PLANNING

PSIs and PICs can collaborate through joint planning for better and more cost-effective delivery of occupational education/training and

related services to students if they understand and agree on the purposes of their collaboration. Any effort to collaborate in the delivery of services of Carl D. Perkins, JTPA, and other agencies responsible for serving the disadvantaged should include these purposes:

- Focus on same population. Entities must agree that collaborative efforts are best for the targeted populations and for program effectiveness.

- Define responsibilities and authority. Collaboration between and among providers and funding agencies can only be achieved when each has a clear understanding of legal requirements and organizational structures and when misunderstandings about responsibilities and functions are removed. Then the highest quality of services to students is achieved.

- Establish effective communications. Collaboration requires constant communication among the coordinating agencies and the students. Communication is required for sharing of information, creating public awareness, and the building of rapport.

Effective collaboration among entities serving the disadvantaged enhances the quality and impact of services to the student. It further increases resources for both providers and students and reduces cost of services by eliminating duplication.

There are a number of strategies that can be used to achieve coordination and linkage through joint planning:

1. **Identify entities** who have been designated responsibilities and/or authority for meeting the needs of the targeted population to be served. A matrix is presented in Figure 2 that gives an example of resources by student classification and services needed. The names and addresses of contact persons for Carl D. Perkins providers (PSIs) and SDAs (JTPA) are provided on pages A-23 through A-43 of Navigating the Labyrinth.

   The examples, (see Figure 2), of needs, programs and services, classification of population conditions, and resources are not

PLANNING MATRIX

Information has been presented in Navigating the Labyrinth on the resources (funds) of Carl D. Perkins and JTPA that can be used for meeting the needs of the disadvantaged. In determining agencies with whom you should coordinate (plan), place the number of the funding source in the box that represents services you desire to provide for the targeted populations served by your institution. The column for the academically disadvantaged has been partially completed to show you how the planning matrix can be completed.

Occupational Training and Support Services \ Targeted Populations	Academically Disadvantaged	Economically Disadvantaged	Handicapped	Limited English Proficient	Single Parent & Homemaker	AFDC Recipient	Migrant	Legal Immigrant
Occupational Instruction		1.2.3						
Basic Skills		1.2.3.6						
English as a Second Language		1.2.3.6						
Financial Assistance								
Literacy Assessment Vocational Assessment		1.2						
Career Counseling		1.2						
Personal Counseling		1.2						
Books, Instructional Materials		2.4						
Health Services								
Tuition								
Child Care		1.2						
Transportation								
Housing								
Job Seeking Skills		1.2.3						
Job Placement		1.2.3						
Follow-through		1.2.3						

1. Carl D. Perkins
2. JTPA
3. Student Contact Hour
4. Pell Grants etc.
5. AFDC
6. ABE
7. _____
8. _____
9. _____

Figure 2

inclusive. Figure 2 provides a guide in completing: Step 1(a), quantitative identification of population(s) needing services; Step1(b), identification of needs of students to be served; Step 3, design of program (composite of instruction and services); and Step 4, source of financial assistance and/or support services.

In planning the programs for the disadvantaged, remember that the final objective of Carl D. Perkins and JTPA is unsubsidized employment of the student. All other activities and services of the program are to assist the student in succeeding in the occupational education and training component and becoming employed. Performance standards are developed for each instructional component of the program. The composite of interim performance standards when achieved result in the final performance standard of employment. Employment that provides the individual with an income that is above the level of poverty or minimum wage and with an occupational cluster orcareer ladder incorporated is preferred.

2. **Establish contact** with the other entity and discuss common problems in meeting the needs of the targeted population. Initial contact should be made as early as possible prior to the date (approximately April of each year) for which training plans and applications must be submitted by each entity to the respective state agencies. The initial contact should be made to arrange for a joint meeting of the administrators of the collaborating entities (PSI - SDA). As a minimum the agenda for the first meeting should include:

   - Date, time, and location for the meeting. The meeting should be on neutral ground if possible. If the PSI and PIC are served by a regional planning unit, the staff of the regional planning unit should host the meeting.

   - Identify individuals that should participate in first meeting. From the PIC this should include the PIC Chair, Executive Director, and Chief Planner. From the PSI this should include a Vice President for Instruction, Dean of Occupational/Technical Education, and Dean of Adult and Continuing Education.

- Specific purposes of the meeting
  - Establish areas of coordination and collaboration
  - Set mutual goals and objectives for joint planning and delivery of services
  - Define roles and delineate responsibilities for future activities
  - Prepare schedules for subsequent meetings for joint planning efforts

3. **Maintain communications** during the planning period and plan for shared participation in the delivery of services. Joint planning is basically the sharing of information as each entity develops their respective plans for the same populations prior to the plans being submitted to the state agencies as applications for funding. Sharing of information is best done by personal interaction. Regular meetings should be scheduled for sharing information compiled during each of the six basic steps of the planning process. It is anticipated that four to six planning meetings should be scheduled for completion of Steps 1 and 2 of the planning process.

   Following the approval of applications for funding at the state level (Step 3 of the planning process), Step 4 will be implemented as usual. The PIC will issue Request for Proposals (RFP) for programs and activities which have been planned. The PSI will distribute approved resources, allocated by the Coordinating Board and contracts resulting from RFPs, for the implementation of planned programs and services.

4. **Use case planning and management approach**
   Dr. Judy Traylor et al, in the publication ADULT BASIC EDUCATION WORKBOOK: Child Care; Transportation; Support Services (Northeast Texas Community College, 1987) has "Case Management" as a strategy for achieving interagency coordination to meet the needs of individual Adult Basic Education students. Dr. Traylor stated:

   > In case management, agencies identified as potential resources in meeting child care and transportation needs come together to develop

a Plan for Coordination of Services .... The purpose of this plan is to develop a service delivery strategy that meets the individual needs of a particular ABE student by:

(1) assessing the problem
(2) setting goals for service delivery
(3) developing a plan of action that describes specific services and responsibilities, and
(4) evaluating the outcome of service delivery.

The case management approach described by Dr. Traylor is a good example of how joint planning could be achieved when planning to offer support services for an individual student or all students in a program having common needs of support services.

5. Develop networking skills

Networking is essential to identifying other organizations, educational institutions, governmental agencies, and individuals with whom collaborative efforts may be developed to obtain resources or services to meet the occupational education and training needs of the disadvantaged. As stated by Dr. Judy Traylor:

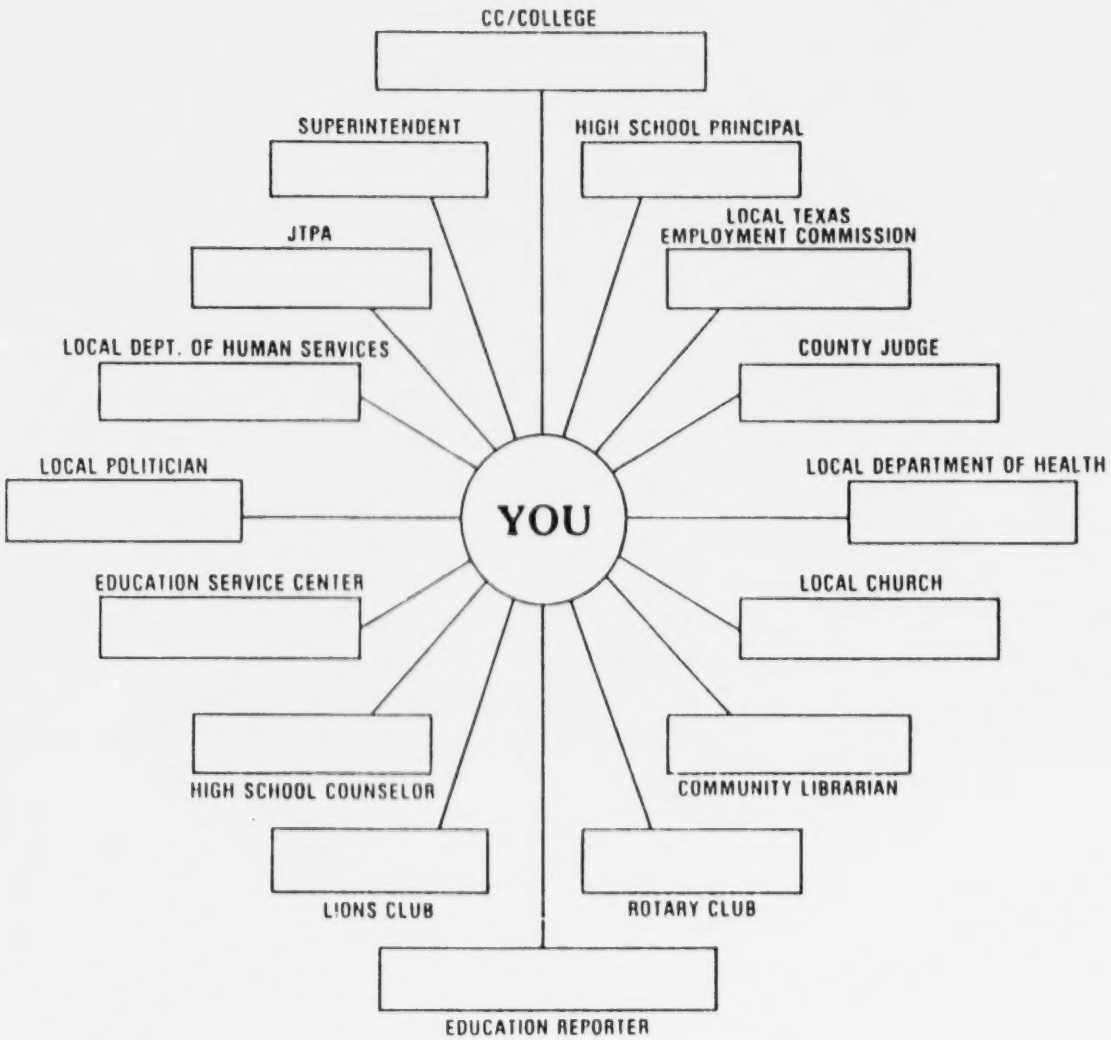
> Networking is a vital part of the interagency coordination that involves --
>
> -- communication
> -- input and education
> -- agreements
> -- information
> -- awareness
> -- sharing of resources
> -- joint planning
> -- incentives
> -- time
> -- cooperation

This manual has only touched the surface on the "how-to" of joint planning for developing interagency coordination and linkages to serve special populations. Basically the manual has described the "how-to" in relation to joint planning between Carl D. Perkins and JTPA. This process can be expanded when you are ready and there is a need for joint planning with other funding sources (legislation) and state and local entities. You may expand your joint planning using the illustration presented in Figure 3, "Establishing Interagency Coordination."

Establishing Interagency Coordination

DIRECTIONS: Determine your interagency networks. Use the Networking Diagram to identify **IMPORTANT PEOPLE** within your network. Use these people as a "first step" in developing an interagency agreement.

MY COMMUNITY NETWORK



NOTE: The names of the above identified agencies, organizations, or positions may be changed to meet the needs of your particular program.

Source: ADULT BASIC EDUCATION WORKBOOK: Child Care; Transportation; Support Services. Mt. Pleasant: Northeast Texas Community College, 1987.

Figure 3

The results of studies made to determine the extent to which joint planning has been conducted between Carl D. Perkins and JTPA entities are presented in Chapter VI of this manual. Chapter VI also includes examples of joint planning activities.

VI.

COORDINATION AND LINKAGE ACTIVITIES

Based on future activities as proposed in Navigating the Labyrinth, a project was funded by the Texas Higher Education Coordinating Board to develop an inventory of exemplary programs using both Carl D. Perkins and JTPA resources. A survey of PSIs and SDAs in the state of Texas was made to identify exemplary programs. In addition, selected institutions in ten other states were surveyed to identify exemplary programs.

The basic questions to be answered by these surveys were the following:

1. To what extent are JTPA participants receiving instruction or other services from PSIs?
2. To what extent are PSIs using both JTPA and Carl D. Perkins funds to provide services in a program to serve special targeted populations?
3. How extensive is joint planning between Carl D. Perkins and JTPA entities?

SUMMARY OF SURVEY FINDINGS

The procedures and results of the survey for identifying exemplary programs using both Carl D. Perkins and JTPA resources in postsecondary institutions were reported in the Final Report of the Texas Higher Education Coordinating Board sponsored project "National Survey for JTPA-Carl Perkins Linkages; Regional Dissemination Workshops; and

Development of a Manual of Model Linkage Programs." A summary of the findings of the survey is presented in the following narrative.

SUMMARY OF FINDINGS, CONCLUSIONS, AND RECOMMENDATIONS

Findings

This summary reflects the findings of the Texas survey in relation to the three basic research questions which served as a basis for the survey.

It was found that 51 percent of the responding PSIs were serving JTPA clients by contract with the administrative entity of the SDA for instruction and other related services. Forty-nine percent of the PSIs responding used both Carl D. Perkins and JTPA funds to provide programs for the common special targeted population. Only 14 percent of the PSIs reporting had assigned an individual to devote 50 percent or more of his/her time for coordination and linkage with a JTPA entity. The majority of the coordination activities identified by the survey respondents occurred after the development and submission of the respective applications to the state agencies for Carl D. Perkins and JTPA funds. Coordination activities which preceeded the submission of the application for state funds consisted of attending meetings of the PIC and/or meetings of the education advisory subcommittee of the PIC. There were no indications in the survey responses that scheduled joint planning meetings for planning total programs had been held at the time the survey was completed. Feedback from participants of the joint planning workshops revealed that joint planning meetings had been scheduled by some of the participants in the workshops.

Conclusions

Coordination and linkage between postsecondary Carl D. Perkins and JTPA entities have, in most cases, resulted from PSIs contracting with JTPA entities to carry out the training plan (state application) of the PIC. Activities conducted during the last two years by the Coordinating Board and the Department of Commerce have developed a receptive attitude between Carl D. Perkins/JTPA program planners for joint planning in the future.

Recommendations

The following recommendations were derived from the survey results and interaction with participants at the (1) six workshops on joint planning, (2) statewide dissemination conference, and (3) statewide equity conference sponsored by the Texas Higher Education Coordinating Board and funded through Carl D. Perkins program improvement competitive grants.

1. The Coordinating Board and the Department of Commerce should cooperatively continue to provide technical assistance, by area workshops, to encourage and expedite joint planning among PSIs, JTPA entities, and other entities with available resources to meet the vocational education and training needs of the common special targeted population.

2. When appropriate, the Department of Human Services should be invited to share the cost of the technical assistance, through area joint planning, to entities providing and/or sponsoring activities to meet the needs of the common special targeted population.

3. The area workshops for providing technical assistance for joint planning should provide for meeting the more indepth needs of the individuals who participated last year and for individuals who did not have the opportunty to participate previously. Efforts should be made to increase the participation of PIC members and members of the local vocational advisory committee of the PSIs.

4. It is highly recommended that joint planning workshops for personnel of PSIs and JTPA and AFDC entities be conducted separately from joint planning workshops conducted for personnel of local secondary education personnel and JTPA entities.

Model programs of coordination and linkage between postsecondary Carl D. Perkins and JTPA entities identified by the survey are presented in Appendices A and B.

APPENDIX A

TEXAS MODEL PROGRAMS

PSI: Amarillo College

JTPA: Panhandle Regional Planning Commission

Program: ACcess Center

Amarillo College contracts with the Panhandle Regional Planning Commission to serve JTPA eligible participants. In the past this has been done on a line-item contract, but now this is being done on a performance-based contract. Amarillo College will assess the level of competency needed by the participant in his/her primary and secondary job choices through a pretest measure. The college will contract with PRPC to have the participant achieve the needed level of competency to be successful in entering the chosen occupation (upgrade basic skills). The funding agreement has been the following:

Adults:	60% upon enrollment
	40% upon completion
Youth:	50% upon enrollment
	50% upon completion

(Note: The contract does not specify that number completed must equal number enrolled. Example of contract: 65 enrolled; 52 completed)

The participants use individualized, computer-aided instruction in the following areas:

- reading
- math
- spelling
- study skills
- writing

Completion of the contract is achieved when the participant tests at the contracted level. The completion rate is very high with many participants deciding to continue their education at the postsecondary level.

Contact: Ms. Judy Isbell
Director, ACcess Center
Amarillo College
P.O. Box 447
Amarillo, Texas 79178
806/371-5000

Ms. Loretta Kindsfather
Director, Employment and Training Division
Panhandle Regional Planning Commission
P.O. Box 9257
Amarillo, Texas 79105
806/372-3381

PSI: El Paso Community College

JTPA: Upper Rio Grande PIC

Program: Displaced Worker Program

The El Paso Community College Displaced Worker Program was developed in response to a critical need for flexible training options and more intensive support systems for low skilled workers displaced as a result of plant closings and slow downs. The garment industry has been particularly hard hit and many former garment workers have low literacy levels and inadequate basic skills needed for retraining. The Displaced Worker Program is a component of the Adult Vocational Training Center which provides comprehensive training and retraining services to adults.

The program is linked cooperatively with a number of community agencies and is funded through college funds, JTPA, TEC, and Carl Perkins. Carl Perkins funds have been used to upgrade course offerings and create flexible entry for this special target population. JTPA and TEC pay student tuition and support services for eligible participants. The program is also linked with the following agencies which all provide outreach and referral for the program: La Mujer Obera (CBO), an advocacy group for garment workers, the El Paso Community College Women's Center, and the YMCA.

Contact: Ms. Patricia Macias
Coordinator, Adult Vocational Training Center
El Paso Community College
103 Montana Drive
El Paso, Texas 79912
915/543-4111

PSI: Howard County Junior College

JTPA: Permian Basin Regional Planning Commission

Program: Hispanic Recruiting and Retention Program

Beginning in the fall of 1986, Howard College conducted a special project entitled "Go Forward Together." The goal of the project was to establish an Hispanic recruiting and retention program that would reverse the tendency of the Hispanic to drop out of the educational process in Howard County. The objectives of the project were as follows:

1. To involve the college with the inner workings of the local Hispanic community;
2. To conduct research into reasons why local Hispanics are dropping out of school;
3. To involve Hispanic role models with the student recruiting effort;
4. To rearrange the college counseling program to meet the newly uncovered needs of Hispanics;
5. To reevaluate the college curriculum, as needed;
6. To work with county high schools to keep the Hispanic students in school;
7. To communicate the aims of the Hispanic recruiting program to the student body, faculty, staff, business community, and the general public;
8. To gain information that will better prepare college administrators, counselors, and teachers to assist Hispanic teachers;
9. To provide financial aid;
10. To provide access to career information; and
11. To document program results including a recruitment/retention plan that can be executed at Howard College and other schools on an on-going basis.

The project was deemed successful with 351 individuals participating. Twenty-five participated in an intensive research project designed to formulate a positive self-concept; JTPA funded this endeavor. Before and after the funding dates for this project, college representatives worked on start-up and closeup activities related to the project. Carl Perkins funds were used fo start-up and close-up activities and vocational counseling for the 25 participants.

Contact: Dr. Cheri T. Sparks
Vice President for Student Services
Howard County Junior College
1001 Birdwell Lane
Big Spring, Texas 79720
915/267-6311

PSI: Laredo Junior College

JTPA: South Texas

Program: Customized Training (Tool & Die)

Laredo Junior College provided customized training for the tool and die industry. The funding source was JTPA and the college used existing laboratories. JTPA paid for the following services:

- classroom training
  - tuition
  - fees
  - books
  - instructional supplies
- transportation
- child care
- guidance and counseling
- job placement

Contact: Dr. Jacinto P. Juarez
Dean of Institutional Development
Laredo Junior College
West End Washington Street
Laredo, Texas 78040
512/722-0521, ext. 163

PSI: Midland College

JTPA: Permian Basin Regional Planning Commission

Program: A Coordinated Educational Program for Disadvantaged Students

INTRODUCTION

The following describes a coordinated program of assessment, skills development, and retention services for JTPA Title IIA eligible students. This program is provided through the efforts of the Midland College Reassessment Project and Adult Basic Education (ABE) programs and JTPA funding support. The major thrust of the program is to coordinate services and support available from various sources so that student potential for success is increased.

The following presents the major elements of the program:

TARGET POPULATIONS: Approximately 20 JTPA Title IIA students

PHASE I: May 2-6, 1988

Participants will be identified and referred by local JTPA staff. They will then be assessed by Reassessment Project and ABE staff. Assessment will include vocational interest and aptitude and basic skill levels in reading, writing, science, and mathematics. They will also receive assistance with financial, college, and career planning.

This phase of the program will be conducted by Reassessment Project and ABE staff as a part of on-going services. The Reassessment Project is supported jointly by local and Carl D. Perkins funds and is a program designed to provide services to special vocational populations.

PHASE II: May 30 - August 11, 1988

Participants will be provided an intensive pre-college program consisting of basic skills instruction. Instruction will be self-contained and scheduled for three hours daily, Mondays through Thursdays, from May 30th through August 11th. At the conclusion of the pre-college instruction, students will be reassessed and receive college advising. JTPA staff will be informed of student progress and recommendations for future action. Recommended student activities may include enrollment in regular Midland

College classes, enrollment in developmental college classes, individual work in the ABE learning center, participation in non-credit adult vocational courses, or on-the-job training.

This phase will be administered by the ABE Coordinator and instruction will take place in the ABE Learning Skills Center and adjacent classrooms. Instructional equipment and materials from the ABE program will be employed as will materials purchased with JTPA funds.

PHASE III: Fall, Spring, 1988-1989

Participants who enroll in Midland College classes or activities will receive tutoring as needed and other retention/follow-up services throughout the school year.

Again, this part of the program will be provided through the Reassessment Project.

Contact: Dr. Deana L. Lusk
Dean of Community Services
Midland College
3600 N. Garfield
Midland, Texas 79705-6399
915/684-7851

Mr. W. C. Wilson, Jr.
JTPA Coordinator
Permian Basin Regional Planning Commission
212 N. Main, Suite 120
Midland, Texas 79701
915/687-3003

PSI: Northeast Texas Community College

JTPA: Ark-Tex Council of Governments

Program: Business and Industrial Development Center

The Business and Industrial Development Center is the umbrella organization for the following three centers at Northeast Texas Community College:

1. Procurement Outreach Center
   Purpose: Provide bid consultant service to industry.
   General data: Funded by JTPA: $100,000
   Serves 9 counties
   To date (16 months of operation):
   104 clients
   50 government contracts ($2 million)
   50 jobs created
2. Small Business Development Center
   Purpose: Provide counseling and consulting services to small businesses
   General data: Funded by the Small Business Association ($37,000) with matching by Northeast Texas Community College ($37,000)
   Serves 4 counties (One county is different from those included in the region served by the Procurement Outreach Center.)
3. Model Program for Economic Development
   Purpose: Expand the small business center concept to also be a resource center for self-employment opportunities by the development of training for new and expanding industries
   General data: Grant from the Texas Higher Education Coordinating
   Board (Carl Perkins): $54,523
   Title: Model Business and Industrial Development Program for Community Colleges

Contact: Mr. Jim Davis
Program Director
Business and Industrial Development Center
Northeast Texas Community College
P.O. Box 1307
Mt. Pleasant, Texas 75455
214/572-1911

PSI: North Lake College
(Dallas County Community College District)

JTPA: Dallas County

Program: Clerical Skills Training

In 1985, Dallas County allocated JTPA funds to initiate a pilot program for mothers caught in the welfare trap. This two-month summer training program has been expanded into the present offering of six months of intensive instruction. Women in the program receive transportation and child care support services as well as close mentorship throughout the program. The training includes the following:

- 160 hours of typing
- 3 English courses
- basic math course
- classes in office machines, word processing and secretarial skills

For background information on the project's development, contact:

Ms. Nancy Kinsey
Associate Dean, Continuing Education
Richland College
12800 Abrams Road
Dallas, Texas 75243-2199
214/238-6146

For current information on the program operations, contact:

Ms. Patsy Blankenship
Office Careers
North Lake College
5001 N. MacArthur Blvd.
Irving, Texas 75038-5297
214/659-5297

PSI: Vernon Regional Junior College

JTPA: Nortex Regional Planning Commission

Program: Computer Training in Office Technology Program for Single Parents

Workshops for participants were funded by Continuing Education and Carl D. Perkins funds. The workshops included career testing and instruction in job-seeking and job-keeping skills. Upon completion of the workshops, participants were directed into various programs available at the college. JTPA then funded the training, providing tuition and other needed support services to the participants.

Contact: Ms. Michaelle Kitchen
Director of Counseling
Vernon Regional Junior College, Wichita Falls Campus
4705 Jacksboro Highway
Wichita Falls, Texas 76302
817/322-4843

APPENDIX B

OTHER MODEL PROGRAMS

PSI: Dalton Junior College (Dalton, Georgia)

JTPA: North Georgia Area Planning and Development

Program: Individual Referral Program

This is a one-year certificate program in any vocational program at Dalton Junior College. Various funding sources are used including Carl Perkins, JTPA, and Pell Grants. A full-time counselor works with this program. The Individual Referral Program has experienced a 90% positive termination rate. Many of the participants continue at Dalton Junior College in the two-year associate degree program.

Contact: Dr. Patricia (Pat) Fornash
Director of Continuing Education
Dalton Junior College
213 North College Drive
Dalton, Georgia 30720
404/226-2454

PSI: Lane Community College (Eugene, Oregon)
Training and Development Department

JTPA: Southern Willamette PIC

These two organizations have developed a unique working relationship, even preparing a joint proposal to the Department of Labor to serve dislocated workers. The college and PIC have unified forces with unions, chambers of commerce, industry, and Eugene, Oregon city administration to conduct labor market surveys, offer customized training programs, and attract new business to the Eugene area. The President of the college serves as a member of the PIC Board. The PIC is the major funding source for the Training and Development Department. Programs using Carl Perkins/JTPA funding have served displaced homemakers and teen parents. One outstanding offering is the six-month office and accounting program.

Contact: Ms. Patti Basconcillo
Coordinator
Occupational-Specific Training Programs
Training and Development Department
Lane Community College
4000 East 30th Avenue
Eugene, Oregon 97405-0640
503/726-2223

PSI: Richland Community College (Decatur, Illinois)

JTPA: Macon County Employment and Training

Program: Displaced Homemakers

This is a very active program which demonstrates joint planning and effective cooperative efforts. Richland Community College provides guidance and counseling -- including a peer networking support group -- and child care support services. JTPA provides employment and OJT services. These two organizations have plans to share staff for a six-month period to aid in a better understanding of each other's role in helping this target population.

Contact: Ms. Jacque Matson
Department Administrator
Macon County Employment and Training
317 North Water
Decatur, Illinois 62523
214/424-1475

PSI: Seven Community Colleges (Seattle-King County, Washington)

JTPA: Washington Employment Security Department

Program: TARGET (The Allied Group for Employment and Training)

TARGET includes the Washington Employment Security Department, seven community colleges, two vocational/technical institutes, and the Wasington Institute of Applied Technology. Each member of TARGET is actively involved in deciding upon the projects to which TARGET will bid and the proposals which will be forwarded to the JTPA administrative entity. The project has effectively unified services with respect to intake, preemployment services, on-the-job training, classroom training, and job search activities for adults, displaced workers, and the homeless. The JTPA entity does the initial assessment and utilizes its counselors in working with personnel at the community colleges in a case management approach with each client. The colleges will use appropriate Carl Perkins funding to serve those eligible for the services.

Contact: Ms. Penny Willson
Director, TARGET
Washington Employment Security Department
1601 2nd Avenue, 4th Floor
Seattle, Washington 98101
206/464-6870